

Evaluation Criteria	Point Value	HealthEquity	Optum Financial, Inc	WEX	
Pricing	40	26	37	33	
Ability to service the contract	25	23	23	23	
References	20	10	18	12	
Technology	7	6	6	6	
Value Added Products and Services	8	7	5	7	
Total	100	72	89	81	0



Evaluation Committee for Contract:

Emily Jeffrey

Chris Thomas

Mike Muscara

Vendors Awarded Under this Contract

HealthEquity

Optum Financial, Inc

WEX



38-22 - Request for Proposal (RFP) for HSA, FSA, DCFSA and Other Lifestyle Financial Management Services

Project Overview

Project Details	
Reference ID	38-22
Project Name	Request for Proposal (RFP) for HSA, FSA, DCFSA and Other Lifestyle Financial Management Services
Project Type	RFP
Project Description	HSA, FSA, DCFSA and Other Lifestyle Financial Management Services
Open Date	Oct 04, 2022 6:00 AM CDT
Close Date	Nov 17, 2022 2:00 PM CST

Seal status

Requested Information	Unsealed on	Unsealed by
Proposal	Nov 17, 2022 2:08 PM CST	Jonathan Applegate
Pricing	Nov 17, 2022 2:09 PM CST	Jonathan Applegate



RFP Bid/Proposal Receipt List:

RFP #38-22 HSA, FSA, DCFSA and
Other Lifestyle Financial
Management Services
Thursday, November 17th, 2022

Supplier	Date Submitted	Name	Email
Optum Financial, Inc	Nov 17, 2022 9:57 AM CST	Christopher Perrera	christopher_perrera@optum.com
HealthEquity	Nov 16, 2022 4:15 PM CST	Bid Project Manager	RFPVendorRegistration@healthequity.com
WEX	Nov 17, 2022 12:15 PM CST	Arika Palloch	arika.palloch@wexinc.com